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ABSTRACT

This paper examines the accomplishments of the Mid-Continent Research for Education and Learning (McREL) district research partners. Informed by 2 years of collaborative experience, the report documents the process McREL used in selecting partner sites and guides future field-based research partnerships by discussing problems encountered and lessons learned regarding the establishment and maintenance of research partnerships. The ultimate goal of establishing the McREL district research partnerships was to explore collaborative-action research as a viable strategy for promoting systemic reform that leads to sustainable, improved achievement for all learners. The report outlines the selection of sites, the establishment of design teams, the design and process of research, and the evaluation of partnerships. The document concludes that collaborative partnerships can be used to move research findings into the field more quickly under the right conditions. Partnering, however, is a complex process and requires both partners to redefine their roles and usual work methods to accommodate a collaborative approach that involves individuals from different professional cultures. More sensitive methods, both for assessing a district's capacity for partnering and for creating a model that depicts the evolving nature of district-McREL partnerships, need to be developed. An annotated interview guide and interview summary assessment compose the bulk of the document. (RJM)

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COLLABORATIVE PARTNERING WITH DISTRICTS: PROBLEMS ENCOUNTERED, LESSONS LEARNED

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INTRODUCTION

As part of its proposed applied research program supported by the OERI regional educational laboratory contract, Mid-Continent Research for Education and Learning (McREL) initiated a field-based component that included the formation of long-term research partnerships with LEAs in its seven-state region. This paper is an interim report of the accomplishments and early lessons learned as the McREL-district research partners conclude their second year of collaboration. The purpose of this report is to document the process McREL used in selecting partner sites and to guide future field-based research partnerships by discussing problems encountered and lessons learned regarding establishing and maintaining research partnerships. A later report will assess the content and findings of the research partnerships.

The ultimate goal of establishing the McREL-district research partnerships was to explore collaborative action research as a viable strategy for promoting systemic reform that leads to sustainable, improved achievement for all learners. Rather than moving research into practice using traditional approaches to diffusing knowledge — for example, technical assistance and in-service teacher training — the field-based component of Task 2 was designed to learn more about how laboratories and districts working together in action-research partnerships might achieve dual goals: creating knowledge and improving schooling. The action research approach was selected for its potential to empower practitioners and communities toward a goal of institutional and social change from the inside (Anderson, Herr & Nihlen, 1994).

In the social sciences, Lewin (as cited in Anderson, Herr, & Nihlen, 1994) is credited with making action research respectable through his study of production in factories and discrimination against minorities. According to Lewin, knowledge should be created from problem solving in real-life situations. Out of this tradition, the goal of action science was developed to generate valid descriptions of the world and ways to change it (Argyris, Putnam, & Smith, 1985).

Similarly, McREL envisioned the research partnerships as building the capacity of district and school staff to use action research to promote changes resulting in improved student achievement. The planned collaborative action research projects would first focus on a problem or unmet need in a specific area (e.g, literacy, standards, assessment, leadership), then promote systemic school improvement by expanding to address the other areas of schooling. It also was expected that changes initiated by the action research would expand beyond the initial participating classrooms and schools to include others, thereby resulting in a scale-up of the reform. The collaborative research projects were developed using a four-stage process, summarized in Exhibit 1 and described in following sections.

Exhibit 1
Development of an Action Research Partnership

STAGE I: SELECT SITES

Conduct initial district site visit by McREL staff
Conduct follow-up meeting with district to negotiate formation of a partnership

STAGE II: ESTABLISH DESIGN TEAMS

Create a Design Team to conduct collaborative action research project
Provide technical assistance to district to build knowledge base and skills needed

STAGE III: DESIGN / CONDUCT RESEARCH

Collaboratively assess needs
Select issue/problem to study
Collaboratively design research study
Develop reforms in policy, programs, or practice
Conduct additional studies (as needed)

STAGE IV: EVALUATE PARTNERSHIPS

Evaluate the effectiveness of partnering as a strategy for promoting school reform
Develop conceptual framework and model for research partnerships
Monitor implementation of reforms
Assess impact of reforms
Develop guide for future partnering efforts

STAGE I: SELECT SITES

The process of site selection began with a request to McREL board members to nominate potential district partners. In 1997, a team of McREL researchers visited selected sites from the list of nominees. During these site visits, researchers interviewed district and school staff (see Appendix A for a list of the questions used in the interview sessions) to assess the extent to which the district had the following characteristics:

- a shared purpose related to school improvement;
- a viable infrastructure capable of supporting education reform;
- a broad-based commitment to participate actively in field-based, action research;
- resources to contribute to a long-term research partnership;

- sufficiently stable leadership to sustain commitment to the effort and leaders involved at all levels who create clarity of purpose as a requisite for commitment;
- the willingness to address issues in all domains of the education system; and
- a willingness to meet, work with, and collaborate with McREL and the other development sites.

McREL researchers analyzed the interview data and rated each district on all seven criteria using the forms provided in Appendix B. After findings from this analysis were reported to district administrators and a mutual decision to proceed was made, partnerships were formed with seven school districts, one in each state in McREL's region, reflecting a variety of demographic profiles, as shown in Exhibit 2. To protect the identities of the sites, they have been randomly assigned pseudonyms based upon the names of the first seven presidents (using "Quincy" to avoid the duplication of "Adams").

Exhibit 2
Sites Selected for Collaborative Research

District Site	Demographic Profile		
	Location	SES	Student Population
Adams School District	Urban	Low-income	African American
Jackson School District	Suburban	Low-, mid-income	Non-minority
Jefferson School District	Rural – "frontier"	Low-, mid-income	Non-minority
Madison School District	Rural – isolated	Low-income	Latino, immigrant
Monroe School District	Urban	Low income	African American
Quincy School District	Rural-reservation	Low-income	Native American
Washington School District	Suburban	Middle-income	Non-minority

A summary of data generated from the site reviews is shown in Exhibit 3. Although some districts received lower ratings on some criteria than others, McREL retained all the sites visited as partners in order to create a mix of sites (i.e., urban, suburban, rural) serving a wide variety of students (e.g., African-American, Hispanic, Native American, and non-minority). In short, McREL chose to initiate some partnerships knowing there might be obstacles to establishing and maintaining successful collaborations. To illustrate the variety of sites selected, the following sections profile each of the seven districts selected as research partners.

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Exhibit 3
Site Selection Criteria Ratings

How well does this school site meet the following selection criteria? 1= Not at all, 4= Completely

Criterion	Adams	Jackson	Jefferson	Madison	Monroe	Quincy	Washington
Shared purpose or goal related to school improvement	3.2	2.9	2.2	1.9	3.0	3.0	3.5
Viable infrastructure capable of supporting reform	3.2	2.8	2.5	2.3	2.8	2.7	3.3
Broad-based commitment to participate actively in field-based, action research	3.3	2.7	2.7	2.3	2.9	2.6	3.0
Resources to contribute to a long-term research partnership	3.3	3.3	2.7	2.4	2.7	3.0	3.4
Sufficiently stable leadership to sustain commitment to the effort & leaders involved at all levels who create clarity of purpose	2.9	2.9	3.6	2.9	3.3	3.0	3.4
Willingness to address issues in all aspects of education system	3.6	2.9	3.1	2.9	3.1	3.2	3.2
Willingness to meet, work with, & collaborate with McREL & other development sites	3.6	3.5	3.5	2.4	3.1	2.5	3.4
Overall Rating	**3.3**	**3.0**	**2.9**	**2.4**	**3.0**	**2.9**	**3.3**

Adams School District

Adams School District is an urban district with approximately 22,000 students — a relatively small district compared to urban school districts nationwide. Even so, the district faces many of the same obstacles of larger, urban school districts; 21 percent of students live in poverty and 55 percent of students in Adams schools qualify for free and reduced lunch. Furthermore, in a state where the student population is largely non-minority, the district's student population is 53 percent African American — a higher percentage than any other district in the state.

Jackson School District

Jackson School District is located in a small city (population 34,000) in a largely rural state. Between 1995 and 1997, enrollment in the district declined by approximately 350 to 7,531 because of an increase in home schooling, a growing private school in the community, and an open enrollment policy, which allowed students to attend schools outside the district. The staff of 564

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teachers is very experienced; many of the teachers have worked in the district for more than 20 years. However, the district faces the challenge of replacing this large cohort of teachers who are retiring.

Jefferson School District

Jefferson School District is located in a rural region where the primary sources of income include ranching, mining, logging, and tourism. The district serves a 3,000-square-mile area and enrolls approximately 1,300 students. Recent changes in the state funding formula caused Jefferson to lose a substantial amount of funding. Thus, it has become increasingly difficult for the district to adequately fund programs for its dispersed population. Moreover, recent budget cuts have reduced the central office's capacity to provide services and technical support to schools.

Madison School District

Madison School District is located in a small (population 8,000), rural, economically depressed town, where 30 percent of the children are below poverty level and the per capita income is $9,286. The student population of 2,521 is approximately 49 percent Hispanic and 48 percent White, non-Hispanic. In recent years, an increasing number of children of Mayan descent have moved to the district from Guatemala. The diverse cultures and languages of the student population have posed challenges for the school district, which for several years has been struggling with an achievement gap between Hispanic and Anglo students, with Hispanic students performing at lower levels.

Monroe School District

Monroe School District is located within an Indian Reservation which is one of the poorest areas in the country with a per-capita annual income of $3,417 and an 80 percent unemployment rate. District officials describe the area as having no sound economic base, poor living conditions, and widespread substance abuse. As a result, the district's 1,026 students, 97 percent of whom are Native American, are at high risk of academic failure. Seventy percent of students drop out before high school graduation.

Quincy School District

The Quincy School District is located in an urban area that has experienced social deterioration and related problems for some time due to limited economic opportunities. Seventy-one percent of the district's 43,000 students are from families who live below the poverty line. Eighty percent of students are African American and 18 percent are White. At the time the partnership began, the district's schools supported a variety of compensatory, remedial, and enrichment programs specifically designed to overcome the detrimental effects of segregation, which was ended in 1980 by a court-ordered desegregation plan.

Washington School District

The Washington School District is located in a mid-size city experiencing rapid growth as new communications businesses move into the area. The county in which Washington is located has

a per-capita income of $14,644. Nearly 95 percent of the district's approximately 18,000 students are non-minority, and only three percent are from families living below the poverty level. Despite growth in the district, a recent cap on state funding forced the district to reduce the size of its central office staff, thereby reducing the services it can provide to schools to support needed reforms.

STAGE II: ESTABLISH DESIGN TEAMS

Following partnership negotiations, a local Design Team was created in each district. Each team was composed of district administrators, specialists, school administrators, teachers, and McREL research and field service staff with appropriate expertise. Although all of the Design Teams included district and school staff, they varied in size and in the ratio of district to school staff and administrators to teachers. Each Design Team participated in all aspects of the research (including the development of collection instruments, the selection of research methods, and the analysis and interpretation of findings), directed the action research effort, and served as a liaison with district schools. Although each Design Team member was expected to be involved in all research activities, McREL staff took the lead and assumed more responsibility for those tasks that required specialized expertise (e.g., survey design and data analysis). The specific responsibilities of McREL staff and of district and school staff are summarized in Exhibit 4. Once the Design Teams were created, McREL staff provided training in action research and gave presentations about current research related to the problem or issue that the district had selected as the focus of its research project.

Exhibit 4
Roles of Design Team Members

District/School Staff	McREL Staff
• Provide information about local context	
	• Help focus the project and develop the research question
	• Address Design Team's need for information and technical skills
• Communicate with school sites; act as liaison	
• Provide oversight and direction for activities conducted at school sites	
• Develop the tools and strategies to collect information (data) needed to answer the research question	• Help develop the tools and strategies to collect information (data) needed to answer the research question
• Guide the collection of information (data) at district or school sites	• Assist with the collection of information (data)
• Assist with data analysis	• Guide data analysis
• Interpret the findings in the context of the district's current conditions and historical influences	• Assist with the interpretation of the findings
• Determine next action steps to be taken	• Help identify the next action steps to be taken

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STAGE III: DESIGN AND CONDUCT RESEARCH

After the Design Teams were established and orientations to the collaborative approach were provided, McREL researchers met with each team to develop a focus for the collaborative action research project in the district. In some cases, the district already had identified a problem or issue to address. Regardless of whether the issue was identified by the district or in conjunction with McREL researchers, the next step was to narrow the issue by translating it into one or more research questions for the Design Team to investigate. (Exhibit 5 summarizes the results of this process in the seven sites.) Goals also were established, specifying the expected outcomes and benefits from each research project. Once research questions were identified, study designs and plans were developed. In every case, the action research projects examined issues in the personal/motivational, technical, or organizational domains of education systems. It was envisioned that over time the projects would evolve toward a systemic view of reform.

Exhibit 5
McREL-District Research Foci and Questions

District	Research Focus	Research Question(s)
Adams[1]	District role in systemic reform	
Jackson	Aligning assessment, curriculum & instruction	• To what extent do the district's Curriculum Scope & Sequence outcomes match the Terra Nova test items?
Jefferson	Implementing standards and assessment reforms	• What are the essential components of an effective assessment system? • How will assessment data be collected, disseminated, and applied to make our current practices better?
Madison	Improving instructional practice and student achievement	• How learner-centered are our practices? • Are some practices more learner-centered than others? • Did a learner-centered approach make a difference in raising achievement?
Monroe	Promoting professional culture & a learning community	• How do we promote change to build a cohesive learning community? • What is the alignment of beliefs among and between all stakeholders in the district?
Quincy	Promoting effective instructional leadership	• What student characteristics promote academic success among students attending district schools? • What instructional characteristics promote academic success among students attending district schools? • What school conditions promote academic success among students attending district schools?
Washington	Improving use of data for decision making	• How are data used by district/school staff for decision making? • How useful are the data provided to decision makers? • What factors affect the use of data for decision-making purposes?

1 *NOTE:* Because the partnership with Adams did not progress beyond the early negotiation stage, no specific research questions were identified. Administrative instability and other competing reform efforts prevented the development of a McREL-district partnership and the implementation of a research partnership.

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STAGE IV: EVALUATE PARTNERSHIPS

As the second year of McREL's collaborative research partnerships draws to a close, the research partnerships remain active in four districts (Madison, Jefferson, Jackson, and Monroe) and were discontinued or suspended in three others (Adams, Washington, and Quincy). As noted in Exhibit 1, the first step of stage four in the collaborative research process is to "evaluate the effectiveness of partnering as a strategy for promoting school reform." To that end, progress in the seven sites was reviewed in an attempt to document why, despite an extensive site selection process, the partnerships met with varying levels of success. The following six factors were identified as critical to creating successful research partnerships:

- early consensus about the focus of research;
- alignment of district and McREL needs and goals;
- stable, committed district leadership;
- district experience working collaboratively on reform efforts;
- available resources; and
- limited competing reform efforts.

Partnerships are, of course, a complex system. They are influenced by dynamic relationships among individuals in each partner group as well as between the partner groups themselves. Like all complex systems, the factors that influence partnerships are inherently interrelated. Yet, for ease of discussion, these factors are discussed separately in the following section, even though these discussions overlap in places — just as the elements themselves overlap. Nonetheless, considering each of these elements separately offers unique insights into the parts of the system, and thus, a more complete view of the system as a whole.

Early Consensus about the Focus of Research

McREL's experiences in the field demonstrated the importance of developing an early consensus about the focus of the research. For example, in Jackson, where Design Team members quickly arrived at a focus for the research project, the project progressed much more quickly. On the other hand, Quincy administrators were eager to examine factors that contributed to students' relatively high levels of achievement at one particular elementary school in comparison to students at other, similar, high-poverty schools. Specifically, they thought the research project should identify what the principal at the higher-performing school was doing right and what the other principals were doing wrong. On the other hand, informal discussions with school staff members suggested that the district seemed to be supporting the leadership at the higher-performing school and perhaps unwittingly undermining leadership at other schools. As a result, some Design Team members thought the research project should examine all of the factors contributing to strong school leadership; others did not want to examine the district's role in supporting school leadership. Without clear agreement about the scope and focus, the research project was unable to move forward.

Alignment of District and McREL Needs and Goals

The ability of districts to reach consensus about the focus of the research was in large part related to how well McREL's staff expertise was aligned to district needs. In Jackson, where McREL's expertise in standards closely matched the district's desire to align local standards and assessments, it was relatively easy to build consensus about the focus of the research and each partner's role in the project. But in districts where the researchers' focus and the district's needs were not closely aligned, such as Madison, it was difficult to achieve consensus and clarity about the purpose of the partnership and the role each partner would play. Initially, Madison administrators were interested in studying literacy issues, but decided to shift the focus to better accommodate the interests of McREL researchers by participating in a field test of newly developed learner-centered survey instruments.

District Experience Working Collaboratively on Reform Efforts

In those districts in which staff members and school leaders had a history of working cooperatively (i.e., Jefferson, Washington, Jackson, and Monroe), McREL-district partnerships were established relatively quickly. Open communication and established personal relationships among local staff members in these districts also facilitated the development of Design Teams. Also, prior positive experiences increased team members' willingness to work as a team to study problems and explore solutions. Conversely, in Madison and Quincy, the development of Design Teams was continually frustrated by fragmented intra-district communication and by local staff members' lack of experience working collaboratively. In Madison, for example, relationships among administrators and teachers were strained. A number of unresolved conflicts and feelings of mistrust among staff impeded the early progress of the Design Team. Considerable time was devoted to conflict resolution and to building trust during the early team meetings before attention could be directed to planning the action research.

Committed, Stable District Leadership

Another key factor that contributed to the success of research partnerships was the ongoing presence of committed district leaders. These individuals were able to provide access to needed resources and staff and lend legitimacy to the projects. Moreover, they were able to champion the projects — an especially important consideration given the vast distances and, thus, limited amount of personal contact between McREL and the district partners. In Jackson, for example, the superintendent monitored the Design Team's progress and required principals to participate in data collection. This level of interest increased the visibility of the project and encouraged participation by school staff. In Washington, the assistant superintendent and curriculum director played key roles on the Design Team, thus ensuring the cooperation of principals and teachers in conducting studies and the use of the findings in decision making.

On the other hand, the sporadic involvement of Jefferson district leaders in the research project hampered its progress. A similar scenario played out in Quincy, where the decreased involvement of two key administrators on the Design Team led to difficulties communicating with the district, problems scheduling meetings, and less participation by school staff. Without local leaders to champion the partnership, the Design Team eventually became inactive. Similarly, in

Adams, the superintendent unexpectedly retired early, prompting a prolonged transition period during which there was no support from key district stakeholders to form a partnership. As a result of this lack of support (and other factors discussed later), a collaborative research project was never formally initiated in the district. It should be noted, however, that the lack of administrator involvement did not always hamper the progress of the research partnerships. In Monroe, for example, the departure of the superintendent and assistant superintendent, who had both been active in the partnership, was countered by the involvement of an influential principal who assumed responsibility for involving teachers from other schools.

Availability of Resources

District leaders' interest in the partnerships had the practical effect of increasing access to staff and other needed resources. In Jackson, Washington, Monroe, Madison, and Jefferson, district administrators provided resources to support the collaborative research projects. In Jackson, the superintendent and school board allocated funds each year to support the team's activities and requested that a quarterly report about the team's activities be provided to the school board. In Jefferson, the district's curriculum director reallocated staff development funds to support the Design Team's activities. Other districts, most notably Quincy, were significantly understaffed, making it difficult for staff members to actively participate in the partnership. In fact, teachers had to leave their classrooms unattended in order to participate in Design Team meetings as substitute teachers were not available in the district. Not surprisingly, staff members were not actively involved from the start and these teams floundered.

Limited Competing Reform Efforts

Another factor that influenced the commitment of district staff was the existence or emergence of competing reform efforts. Shortly after the initiation of research partnerships, Washington, Quincy, and Madison were all confronted with state pressure to change policies and, thus, were compelled to shift attention and resources away from the partnerships. Specifically, a state mandate to adopt standards prompted Washington officials to refocus staff resources away from the research project and toward developing a new curriculum policy, adopting standards, and changing assessment and instructional practices. In Quincy, the need to retain state accreditation diverted the district's attention away from the research project and eventually resulted in the termination of the partnership. In Madison, the district had to change curriculum, policies, and practices in response to state mandates to improve student outcomes and in response to pressure from the Office of Civil Rights to improve student outcomes. This issue temporarily diverted attention away from the learner-centered focused of the partnership. In Adams, the district already had a number of reform efforts and partnerships underway. The extensive list of existing initiatives made it difficult to identify a clear research focus and led to the eventual discontinuation of the McREL-district partnership.

RECOMMENDATIONS

In documenting the experiences of McREL's research partnerships, it became apparent that the six factors identified as influencing the outcomes of partnerships correspond with three of the original selection criteria:

- a shared purpose related to school improvement;
- sufficiently stable leadership to sustain commitment to the effort and leaders involved at all levels who create clarity of purpose as a requisite for commitment; and
- resources to contribute to a long-term research partnership.

This finding suggests that these three criteria may be more critical to the success of a partnership than the others. As a result, they may demand more careful scrutiny and/or need to be more heavily weighted in the criteria ratings during the site selection process. However, as the previous section demonstrates, unexpected issues and concerns — which may be difficult, if not impossible, to forecast during the site selection process — do arise. Thus, during the course of the research partnership, it may be necessary to revisit the site selection criteria to assess and maintain the efficacy of the partnership. The following section offers five recommendations for actions that might help mitigate the negative effect of these issues (see Exhibit 6).

Exhibit 6
Related Site Selection Criteria, Critical Factors and Recommendations

Site Selection Criterion	Critical Factor	Recommendation
• A shared purpose related to school improvement	• Early consensus about the focus of research • Alignment of district and McREL needs and goals	• Carefully match the interests and needs of both partners • Draft a memorandum of understanding to set project time lines and objectives
• Sufficiently stable leadership	• Stable, committed district leadership • District experience working collaboratively on reform efforts	• Maintain close contact with all levels of local staff • Use local consultants to facilitate partnerships
• Availability of resources to contribute to a long-term research partnership	• Available resources • Limited competing reform efforts	• Stipulate what each partner will contribute to the reform • Assess district's long-term capacity to support the reform effort with resources

Carefully Match the Interests and Needs of Both Partners

The ability of partners to form a consensus about the focus of research early in the evolution of the project is closely related to the alignment of district and McREL needs and goals. Thus, to a great extent, the success of the partnership is dependent upon a good match between the needs of both partners. Without a well-defined or compelling need, it is difficult to focus the attention and efforts of the partners and to establish a common agenda and consensus about desired objectives and outcomes. Some sense of urgency about accomplishing desired outcomes (e.g., the need to meet state-mandated reforms) may be used to promote the formation of a partnership and the continued

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engagement of partners. At some level, the individual interests or needs of the partners must be accommodated and incorporated into the objectives for the partnership's efforts. Although the interests of each partner might be slightly different, each organization must perceive that benefits will accrue from its involvement in the partnership that would not be attainable alone. Thus, prior to agreeing to become partners, the two organizations should identify and clearly articulate their common goals and needs in a memorandum of understanding.

Draft a Memorandum of Understanding to Set Project Time Lines and Objectives

Simply involving key leaders and discussing goals and needs will not guarantee success if they do not work together well or have little experience working collaboratively on reform efforts. District staff members may likely need guidance in collaborating and in conducting action research. To that end, partners' roles should be clarified with a formal, written memorandum of understanding. This agreement should establish expected milestones, outcomes, and time frames for the partnership. Establishing specific time lines for completion of tasks and realistic objectives for the reform efforts will help stakeholders understand the scope of the effort and the commitments required to implement changes. Time lines also can serve as useful mechanisms for holding partners accountable, while communicating that full implementation of reforms may take a substantial period of time to unfold and, thus, may not immediately impact student achievement. The fact that reforms may not have an immediate impact often can lead to declining enthusiasm for and/or resistance to reforms. Without strong commitment from leaders and "buy-in" from stakeholders, obtaining political support, resources, and staff participation is difficult, if not unlikely (Goertz, Floden, & O'Day, 1995). Thus, time lines should include opportunities for documenting the attainment of milestones along the way toward long-term outcomes, such as changes in policies, programs, or practices, in order to justify the need for reform and counter potential criticism of lack of results (Bodilly, 1998; Green & Kreuter, 1991).

Maintain Close Contact with Several Levels of Local Staff

The involvement of district leaders is important because they can lend credibility to and maintain interest in the research project. But leadership is not necessarily limited to central office administrators. School staff members, such as influential principals, also can play a key role in maintaining the viability of the research partnership. As such, it is important to maintain regular, meaningful contact with several levels of local staff members — not just with district leaders. As McREL discovered, however, the distance between partnership sites can limit the amount of contact between partners, and in turn, decrease engagement and slow the progress of the research. Thus, it is vital to the success of the partnerships that regular visits to the district are made and augmented by consistent electronic and telephone contact. The contacts, of course, should have clearly defined purposes, such as local staff members providing researchers with progress reports, or researchers providing answers to local staff members' questions. In districts where rapid progress is occurring, it is especially important for researchers to maintain frequent contact with local staff in order to stay in the loop and facilitate rather than impede the change process.

Use Local Consultants to Facilitate Partnerships

Given the distances between the McREL office and its research partners, it was found that establishing a local presence within the district through the use of consultants was an effective way to help keep local staff members involved in the project. For example, in Jackson, where McREL contracted with local consultants who work closely with the Design Team, research has progressed more quickly than in some of the sites where no local McREL presence has been established. In Jefferson, the McREL consultants have been able to handle logistical matters, such as arranging meetings and distributing minutes as well as provide more immediate responses to staff concerns or questions. In addition, consultants are able to provide McREL with important insights into changes in the local context that may impact the success of the partnerships. When consultants are used, it is important to ensure that they are properly trained to assist in the research projects, that they understand the purpose of the research partnerships, and that they remain in constant contact with the research team.

Stipulate What Each Partner Will Contribute to the Reform

The memorandum of understanding also should specify the resources, both financial and personnel, that each organization will contribute to the partnership. Unless both partners make some type of financial contribution to the partnership, they can easily withdraw their commitments to it without losing anything. As one superintendent put it during a June 1999 meeting at McREL, "There is no real partnership unless each organization brings its checkbook." Districts need to be aware that the partnerships may require a financial or material commitment and that the level of effort and resources required will fluctuate depending on the stage of project development. For example, the early development and implementation stages may require more staff involvement and resources than the maintenance stage. Furthermore, the availability of resources (e.g., staff time commitments) may change over time and hamper the full implementation and maintenance of reforms at a level needed to create or sustain desired outcomes. Consequently, resource commitments should be reviewed periodically, and adjustments to the roles and contributions of each partner should be discussed along with the implications for the reform effort.

Assess District's Long-Term Capacity to Support the Reform Effort with Resources

As noted earlier, the success of a partnership often depends on whether or not the district is undertaking competing reform efforts. In many cases, the need to respond to external regulatory agencies' requirements can become a competing interest and reduce the district's commitment to a partnership's efforts. Even in well-financed, well-managed districts, other commitments may force districts to redirect their attention away from the partnership. Although it may be difficult to anticipate the emergence of some competing reforms, such as new regulations, other issues, such as struggles to remain accredited, can be more easily forecasted. Thus, districts should consider what competing concerns may arise, if any, and how these challenges might affect the partnership.

CONCLUSION: IMPLICATIONS FOR FUTURE PARTNERSHIPS

The research partnerships allowed McREL to study the change process in school districts over an extended period of time. In doing so, McREL researchers learned a number of important lessons about the change process and the formation and maintenance of collaborative partnerships with school districts — not the least of which was that collaborative partnerships can be used to move research findings into the field more quickly under the right conditions. Partnering, however, is a complex and costly process, requiring both partners to redefine their roles and usual work methods to accommodate a collaborative approach that involves individuals from different professional cultures. Moreover, it requires a long-term commitment. It takes considerable time to establish a common agenda and generate real trust and commitment, and even more time to reach consensus about the design and implementation of the reform.

Both researchers and K–12 practitioners have much to learn from one another about the application of theoretical and conceptual frameworks in real-world settings and about the use of research findings to guide school improvements. The reflections of McREL researchers on their experiences working with long-term research partners resulted in a better understanding of the factors that affect the development of collaborative research partnerships as well as the implementation of district and school reforms.

As McREL begins the final phase of its partnerships with districts, the following issues need to be considered in order for the field-based component of McREL's applied research program to achieve the intended goals of moving research into practice, promoting systemic school reform, and studying the change process.

First, more sensitive methods need to be developed to assess a district's capacity for partnering. Second, a model needs to be created that depicts the evolving nature of district-McREL partnerships and the characteristics of the different types of partnerships that might develop over time. For example, the typology of partnerships developed by Barnett, Hall, Berg, and Camarena (in press) promotes greater clarity during the early stages of partnership formation about partners' roles and expectations for desired outcomes. McREL's experience indicates that the roles of partner organizations could change over time and that these changes need to be continually renegotiated because of shifts in needs and resource availability. Third, researchers working with such partnerships must move from the paradigm of objective observer to one of active participant-observer. Researchers must become knowledgeable about contextual factors and the district/school culture in order to help practitioners successfully adapt research-based models and strategies to fit local conditions. Sharing multiple perspectives — the theoretical and conceptual perspectives of researchers and the practical perspectives of K–12 practitioners — can lead to new insights about the feasibility and potential impact of research-based school improvement models and strategies.

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APPENDIX A: ANNOTATED INTERVIEW GUIDE

Annotated Interview Guide

This annotated interview guide is designed to highlight the type of information needed to the established site selection criteria from the various viewpoints. It covers all questions in the superintendent and central office staff, principal, teacher, and school board member interview guides.

The (superintendent and central office staff/principal/teacher/school board member) interview guide organizes questions around each of the selection criteria. Please familiarize yourself with the entire guide, as well as the annotated guide, because a response for each of the selection criteria (bold headings) is required, although the exact sequence of questioning will vary depending on the interviewee's responses. In some instances answers to subsequent questions will be provided in response to a previous question. Simply record the information appropriately – there is no need to re-ask a question if it has already been answered. In other instances it will be necessary to modify a question somewhat given previous responses. **Remember that this is a guide**. Allow 1-1½ hours per interview. Probes are provided for some questions to help you maintain the interview focus. Please record in your notes if a person does not answer the question (do not leave blank).

Interviewee Name _____ Title _____

Years in present position _____ Years in school district _____

Site _____ City _____ State _____

Interviewer _____ Date _____

A. A shared purpose or goal related to school improvement

Section Purpose: Determine if the importance of a common vision is understood, if the vision is widely embraced, or how far the site has come in creating one. Is the creation of a vision something we might have to help with?

1. How would you describe the district's vision for school reform or improvement or your progress toward developing one?

   Obtain an overall view of the site's plan for the future. Do they see a need for change/improvement and how do they intend to accomplish it? Is the vision a broad one that encompasses all aspects of the educational system or a narrowly defined one that focuses on only one or two areas? If documentation of the vision statement or improvement plan are offered, take them.

2. How widely is the vision accepted or understood? Is this vision broadly shared among various groups (board members, administrators, teachers, parents, community leaders, etc.)?

   If a site vision exists, determine how widely it is accepted and understood? By whom?

3. What strategies have been used to build consensus?

Establish that the interviewee is reporting on actual consensus rather than merely their opinion that a common vision exists. Explore the process used to develop the consensus and disseminate the vision. Even if no consensus exists, determine what efforts were used to create support.

B. A viable support system that is capable of supporting educational reform

Section Purpose: Determine the extent to which the site has created an environment that can support change. Has some progress been made on supporting an improvement effort that indicates an understanding of the scope and complexity of the task. To what extent will we have to help develop an infrastructure? Will it be possible?

4. What supports (e.g., existing programs, teacher/administrator motivation and belief in the vision) are available in the district that promote efforts to achieve the vision you just described?

Identify some things operating in the site that will help reach the vision: strong professional development emphasis, involved community, motivated teachers, highly involved or educated parents, strong technology focus, etc.

5. What are the barriers or obstacles to creating or achieving the vision you described?

Identify obstacles have been identified or removed: policy changes, community perceptions, teacher interest.

C. A district wide commitment to participate actively in field-based, action research and development

Section Purpose: Determine the extent to which we can expect site personnel to engage in the field-based R&D process. To what extent will we have to educate staff about the process?

6. How important is it for local staff to explore and develop their own strategies to improve student learning?

Do staff have an interest in exploring and developing their own strategies to improve student learning?

7. Could you briefly describe the district's experience with research projects?

Determine if there is local experience with research projects. Determine if there is evidence that the R&D process has been successfully implemented in the site in the past.

D. Resources to contribute to a long-term research partnership

Section Purpose: Determine if the site can contribute to the partnership in tangible ways. This is often considered essential to successful collaborations.

8. What kinds of resources does the site have to contribute to a partnership (e.g., release time, after school time, substitutes, knowledge and skills of staff)?

   Determine the extent to which the site will be able to support the collaborative R&D effort.

E. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort

Section Purpose: Determine the extent to which the vision and direction of the site have been supported by consistent leadership, and if the direction established is likely to withstand changes in leadership. Determine if we are likely to experience major changes in leadership during our project period.

9. How many members comprise the Board? How long have the current board members been in office? Have there been any major changes? Are any major changes anticipated?

   Determine if there has been a recent or future major change in Board membership and composition.

10. How long has the superintendent been in that position? How long had the previous superintendent held that position? What was the nature of that leadership? How would you characterize the leadership now?

    Determine the consistency of leadership and general direction over the past few years.

11. What is the principal turnover rate in the district? Do some schools have a different rate than others? Why?

    Determine the continuity of building leadership.

12. What is the teacher turnover rate in the district? Do some schools have a different rate than others? Why?

    Determine if it is likely that we will be continually involving new teachers in our efforts.

F. A willingness to address issues in all domains of the educational system

Section Purpose: Determine the relative importance of the various research areas we intend to launch. Does this site have a systemic reform frame of reference?

13. To what extent do you think that issues regarding standards, curriculum, and/or assessment are a high priority in this district?

    Determine the interest or need regarding standards, curriculum, and assessment issues that might be included in the technical domain as we define it.

14. To what extent do you think that issues regarding teacher-student interaction, diversity, instructional practice, motivation, and/or staff development are a high priority in this district?

Determine the interest or need regarding teacher-student interaction, diversity, instructional practice, motivation, and staff development issues that might be included in the personal domain as we define it.

15. To what extent do you think that issues regarding management, staffing, and/or policy are a high priority in this district?

Determine the interest or need regarding management, staffing, policy, etc., issues that might be included in the organizational domain as we define it.

16. To what extent do you think that issues regarding the integrated, comprehensive approaches to improvement and change and/or the use of evaluation data and feedback are a high priority in this district?

Determine the interest or need regarding the integrated, comprehensive approaches to improvement and change, the use of evaluation data and feedback, etc. issues that might be included in our definition of systemic change.

G. A willingness to meet, work with and collaborate with McREL and the other research sites to create and deliver scaling up activities

17. Would you be interested in working with other research sites involved in this effort (which might include having visitors)?

Determine if the site is likely to adopt a sharing or an isolationist posture.

18. Have you collaborated with other organizations in the past? If so, discuss those experiences and their outcomes. (How did it go?)

Determine if there is a history of collaboration and visibility for site activities.

H. A willingness to establish a local collaboration team with an identified contact person to communicate with McREL

Section Purpose: Determine if a local team with appropriate leadership can be established at the site. These questions should be asked only if there is a good likelihood, given the responses received to this point, that this site will be selected as an R&D partner.

19. Are there existing team structures dealing with improvement/reform issues that we could work with or expand?

Determine if there is a history of teamwork in the site. Identify any existing groups that might serve as a local R&D team.

20. Would you be able to configure a local R&D team that represents all appropriate constituent groups?

Determine if the needed constituent group representation can be obtained in a local R&D team.

I. Additional comments

21. Is there anything we haven't already covered that you would like us to know about this site?

Superintendent and Central Office Staff Interview Guide

The superintendent/central office staff interview guide organizes questions around each of the selection criteria. Please familiarize yourself with the entire guide, as well as the annotated guide, because a response for each of the selection criteria (bold headings) is required, although the exact sequence of questioning will vary depending on the interviewee's responses. In some instances answers to subsequent questions will be provided in response to a previous question. Simply record the information appropriately – there is no need to re-ask a question if it has already been answered. In other instances it will be necessary to modify a question somewhat given previous responses. **Remember that this is a guide**. Allow 1-1½ hours per interview. Probes are provided for some questions to help you maintain the interview focus. Please record in your notes if a person does not answer the question (do not leave blank).

Interviewee Name _____ Title _____

Years in present position _____ Years in school district _____

Site _____ City _____ State _____

Interviewer _____ Date _____

A. A shared purpose or goal related to school improvement

1. How would you describe the district's vision for school reform or improvement or your progress toward developing one?

2. How widely is the vision accepted or understood? Is this vision broadly shared among various groups (board members, administrators, teachers, parents, community leaders, etc.)?

3. What strategies have been used to build consensus?

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B. A viable support system that is capable of supporting educational reform

4. What supports (e.g., existing programs, teacher/administrator motivation and belief in the vision) are available in the district that promote efforts to achieve the vision you just described?

5. What are the barriers or obstacles to creating or achieving the vision you described?

C. A district wide commitment to participate actively in field-based, action research and development

6. How important is it for local staff to explore and develop their own strategies to improve student learning?

7. Could you briefly describe the district's experience with research projects?

D. Resources to contribute to a long-term research partnership

8. What kinds of resources does the site have to contribute to a partnership (e.g., release time, after school time, substitutes, knowledge and skills of staff)?

E. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort

9. How many members comprise the Board? How long have the current board members been in office? Have there been any major changes? Are any major changes anticipated?

10. How long has the superintendent been in that position? How long had the previous superintendent held that position? What was the nature of that leadership? How would you characterize the leadership now?

11. What is the principal turnover rate in the district? Do some schools have a different rate than others? Why?

12. What is the teacher turnover rate in the district? Do some schools have a different rate than others? Why?

F. A willingness to address issues in all domains of the educational system

13. To what extent do you think that issues regarding standards, curriculum, and/or assessment are a high priority in this district?

14. To what extent do you think that issues regarding teacher-student interaction, diversity, instructional practice, motivation, and/or staff development are a high priority in this district?

15. To what extent do you think that issues regarding management, staffing, and/or policy are a high priority in this district?

16. To what extent do you think that issues regarding the integrated, comprehensive approaches to improvement and change and/or the use of evaluative data and feedback, are a high priority in this district?

G. A willingness to meet, work with and collaborate with McREL and the other research sites to create and deliver scaling up activities

17. Would you be interested in working with other research sites involved in this effort (which might include having visitors)?

18. Have you collaborated with other organizations in the past? If so, discuss those experiences and their outcomes. (How did it go?)

H. A willingness to establish a local collaboration team with an identified contact person to communicate with McREL

19. Are there existing team structures dealing with improvement/reform issues that we could work with or expand?

20. Would you be able to configure a local R&D team that represents all appropriate constituent groups?

I. Additional comments

21. Is there anything we haven't already covered that you would like us to know about this site?

School Board Member Interview Guide

The school board member interview guide organizes questions around each of the selection criteria. Please familiarize yourself with the entire guide, as well as the annotated guide, because a response for each of the selection criteria (bold headings) is required, although the exact sequence of questioning will vary depending on the interviewee's responses. In some instances answers to subsequent questions will be provided in response to a previous question. Simply record the information appropriately – there is no need to re-ask a question if it has already been answered. In other instances it will be necessary to modify a question somewhat given previous responses. **Remember that this is a guide**. Allow 1-1½ hours per interview. Probes are provided for some questions to help you maintain the interview focus. Please record in your notes if a person does not answer the question (do not leave blank).

Interviewee Name _____ Title _____

Years in present position ___ Years in school district ___

Site _____ City _____ State _____

Interviewer _____ Date _____

A. A shared purpose or goal related to school improvement

1. How would you describe the district's vision for school reform or improvement or your progress toward developing one?

2. How widely is this vision accepted or understood? Is this vision broadly shared among various groups (board members, administrators, teachers, parents, community leaders, etc.)?

3. What strategies have been used to build consensus?

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B. A viable support system that is capable of supporting educational reform

4. What supports (e.g., existing programs, teacher/administrator motivation) are available in the district that promote efforts to achieve the vision you just described?

5. What are the barriers or obstacles to creating or achieving the vision you described?

C. A district wide commitment to participate actively in field-based, action research and development

6. How important is it for local staff to explore and develop their own strategies to improve student learning?

7. Could you briefly describe the district's experience with local research activities or projects?

D. Resources to contribute to a long-term research partnership

There are no questions in this section for the school board member to answer. The resources of which the Board is aware will probably be mentioned in Question B4.

E. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort

8. How many board members are currently in office? How long have they been in office? Have there been any major changes? Are any major changes anticipated? Do you think that the nature of the board will change as members are replaced?

9. How long has the superintendent been in that position? How long had the previous superintendent held that position? What was the nature of that leadership? How would you characterize the leadership now?

10. What is the principal turnover rate in the district? Do some schools have a different rate than others? Why?

11. What is the teacher turnover rate in the district? Do some schools have a different rate than others? Why?

F. A willingness to address issues in all domains of the educational system

12. To what extent do you think that issues regarding standards, curriculum, and/or assessment are a high priority in this district?

13. To what extent do you think that issues regarding teacher-student interaction, diversity, instructional practice, motivation, and/or staff development are a high priority in this district?

14. To what extent do you think that issues regarding management, staffing, and/or policy are a high priority in this district?

15. To what extent do you think that issues regarding the integrated, comprehensive approaches to improvement and change and/or the use of evaluative data and feedback, are a high priority in this district?

G. A willingness to meet, work with and collaborate with McREL and the other research sites to create and deliver scaling up activities

16. Would you be interested in working with other research sites involved in this effort (which might include having visitors)?

17. Have you collaborated with other organizations in the past? If so, discuss those experiences and their outcomes. (How did it go?)

H. A willingness to establish a local collaboration team with an identified contact person to communicate with McREL

There are no questions in this section for the school board member to answer.

I. Additional comments

18. Is there anything we haven't already covered that you would like us to know about this site?

Principal Interview Guide

The principal interview guide organizes questions around each of the selection criteria. Please familiarize yourself with the entire guide, as well as the annotated guide, because a response for each of the selection criteria (bold headings) is required, although the exact sequence of questioning will vary depending on the interviewee's responses. In some instances answers to subsequent questions will be provided in response to a previous question. Simply record the information appropriately – there is no need to re-ask a question if it has already been answered. In other instances it will be necessary to modify a question somewhat given previous responses. **Remember that this is a guide**. Allow 1-1½ hours per interview. Probes are provided for some questions to help you maintain the interview focus. Please record in your notes if a person does not know the answer to the question (do not leave blank).

Interviewee Name _____ Title _____

Years in present position: ___ Years in school district: ___

Site _____ City _____ State _____

Interviewer _____ Date _____

A. A shared purpose or goal related to school improvement

1. How would you describe the district's vision for school reform or improvement or your progress toward developing one? Is there a school vision?

2. How widely is the vision accepted or understood? Is this vision broadly shared among various groups (board members, administrators, teachers, parents, community leaders, etc.)?

3. What strategies have been used to build consensus at the district level? At the school level?

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B. A viable support system that is capable of supporting educational reform

4. What supports (e.g., existing programs and staff motivation) are available in the district/school that promote efforts to achieve the vision you just described?

5. What are the barriers or obstacles to creating or achieving the vision you described?

C. A district wide commitment to participate actively in field-based, action research and development

6. How important is it for your staff to explore and develop their own strategies to improve student learning?

7. Could you briefly describe the district's and the school's experience with local research activities or projects?

D. Resources to contribute to a long-term research partnership

8. What kinds of resources does the site have to contribute to a partnership (e.g., release time, after school time, substitutes, knowledge and skills of staff)?

E. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort

9. How many members are on the board? How long have they been in office? Have there been any major changes? Are any major changes anticipated?

10. How long has the superintendent been in that position? How long had the previous superintendent held that position? What was the nature of that leadership? How would you characterize the leadership now?

11. What is the principal turnover rate in the district? How long have you been in this position? How long had the previous principal been in this position?

12. What is the teacher turnover rate in this school? What about other schools in the district?

F. A willingness to address issues in all domains of the educational system

13. To what extent do you think that issues regarding standards, curriculum, and/or assessment are a high priority in this school? in this district?

14. To what extent do you think that issues regarding teacher-student interaction, diversity, instructional practice, motivation, and/or staff development are a high priority in this school? in this district?

15. To what extent do you think that issues regarding management, staffing, and/or policy are a high priority in this school? in this district?

16. To what extent do you think that issues regarding the integrated, comprehensive approaches to improvement and change and/or the use of evaluative data and feedback, are a high priority in this school? in this district?

G. A willingness to meet, work with and collaborate with McREL and the other research sites to create and deliver scaling up activities

14. Would you be interested in working with other research sites involved in this effort (which might include having visitors)?

15. Have you collaborated with other organizations in the past? If so, discuss those experiences and their outcomes. (How did it go?)

H. A willingness to establish a local collaboration team with an identified contact person to communicate with McREL

16. Are there existing team structures dealing with improvement/reform issues that we could work with or expand, e.g., those for site based management or school improvement issues?

I. Additional comments

17. Is there anything we haven't already covered that you would like us to know about this site?

Teacher Interview Guide

The teacher interview guide organizes questions around each of the selection criteria. Please familiarize yourself with the entire guide, as well as the annotated guide, because a response for each of the selection criteria (bold headings) is required, although the exact sequence of questioning will vary depending on the interviewee's responses. In some instances answers to subsequent questions will be provided in response to a previous question. Simply record the information appropriately – there is no need to re-ask a question if it has already been answered. In other instances it will be necessary to modify a question somewhat given previous responses. **Remember that this is a guide**. Allow 1-1½ hours per interview. Probes are provided for some questions to help you maintain the interview focus. Please record in your notes if a person does not answer the question (do not leave blank).

Interviewee Name _____ Title _____

Years in present position: _____ Years in school district: _____

Site _____ City _____ State _____

Interviewer _____ Date _____

A. A shared purpose or goal related to school improvement

1. How would you describe the district's and/or the school's vision for school reform or improvement or your progress toward developing one?

2. How widely is the vision accepted or understood? Is this vision broadly shared among various groups (board members, administrators, teachers, parents, community leaders, etc.)?

3. What strategies have been used to build consensus?

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B. A viable support system that is capable of supporting educational reform

4. What supports (e.g., existing programs, teacher motivation) are available in the district and/or school that promote the efforts to achieve the vision you just described?

5. What are the barriers or obstacles to creating or achieving the vision you described?

C. A district wide commitment to participate actively in field-based, action research and development

6. How important is it for you and other teachers to explore and develop your/their own strategies to improve student learning? Could you give examples?

7. Could you briefly describe the school's or district's experience with local research activities or projects?

D. Resources to contribute to a long-term research partnership

8. How does the school handle issues such as release time for teachers, after school time, and substitutes?

E. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort

9. How many members are on the school board? How long have they been in office? Have there been any major changes? Are any major changes anticipated?

10. How long has the superintendent been in that position? How long had the previous superintendent held that position? What was the nature of that leadership? How would you characterize the leadership now?

11. How long has the principal been in that position? How long had the previous principal held that position? What was the nature of that leadership? How would you characterize the leadership now? What is the principal turnover rate in the district?

12. What is the teacher turnover rate in the school? What about other schools in the district?

F. A willingness to address issues in all domains of the educational system

13. To what extent do you think that issues regarding standards, curriculum, and/or assessment are a high priority in this school? in this district?

14. To what extent do you think that issues regarding teacher-student interaction, diversity, instructional practice, motivation, and/or staff development are a high priority in this school? in this district?

15. To what extent do you think that issues regarding management, staffing, and/or policy are a high priority in this school? in this district?

16. To what extent do you think that issues regarding the integrated, comprehensive approaches to improvement and change and/or the use of evaluative data and feedback, are a high priority in this school? in this district?

G. A willingness to meet, work with and collaborate with McREL and the other research sites to create and deliver scaling up activities

17. Would you be interested in working with other research sites involved in this effort (which might include having visitors)?

18. Have you collaborated with other organizations in the past? If so, discuss those experiences and their outcomes. (How did it go?)

H. A willingness to establish a local collaboration team with an identified contact person to communicate with McREL

19. What type of team structures exist in this school?

I. Additional comments

20. Is there anything we haven't already covered that you would like us to know about this site?

APPENDIX B: INTERVIEW SUMMARY ASSESSMENT

Interview Summary Assessment

Interviewee _____ Date _____

Role at Site _____ Reviewer _____

Site _____

Please summarize the data collected in each major section of the interview by completing the following rating scales for each selection criteria. Use the comment lines to provide a few key words drawn from the interviewee's responses that supports your rating. Information collected as additional comments should be considered in relation to the appropriate criteria.

1. How well does this school or site meet the following selection criteria:

	Not At All			Completely
a. A shared purpose or goal related to school improvement	1	2	3	4
Comments: _____				
b. A viable support system that is capable of supporting educational reform	1	2	3	4
Comments: _____				
c. A district wide commitment to participate actively in field-based, action research and development	1	2	3	4
Comments: _____				
d. Resources to contribute to a long-term research partnership	1	2	3	4
Comments: _____				
e. The leadership is sufficiently stable and the system is sufficiently stable to sustain a commitment to this effort	1	2	3	4
Comments: _____				

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	Not At All			Completely
f. A willingness to address issues in all domains of the educational system	1	2	3	4

Comments: _____

g. A willingness to meet, work with and collaborate with McREL and other research sites to create and deliver scaling up activities	1	2	3	4

Comments: _____

h. A willingness to establish a local collaboration team with an identified contact person to communicate with the McREL team	1	2	3	4

Comments: _____

2. Overall Recommendation:

Please indicate your recommendation by checking only one category.

_____ 1. No, does not meet the selection criteria.

_____ 2. Possible, but the following additional information is needed: _____

_____

_____ 3. Yes, with the following cautions: _____

_____

_____ 4. Yes, go forward with this site.

Other Comments:

_____

_____

_____

_____

Site Review Summary Sheet

Site: _____

This form is designed to summarize all site review information for the team debriefing session.

Role	Interviewee Name	Interviewer Initials	Rating[1]	Comments
Superintendent				
Board Chair				
Principal 1				
Principal 2				
Principal 3				
Teacher 1				
Teacher 2				
Teacher 3				
Teacher 4				
Teacher 5				
Teacher 6				
Other 1				
Other 2				
Other 3				
OVERALL SITE RATING				

[1]Use numbers (1-4) from item 2 on Interview Summary Assessment.

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